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# Taiwan ICT Hardware Industry 2006

## By Jacy Huang

# Current Status

❖ A major procurement center for global ICT companies

❖ Ranked first in WW ICT product market share for more than 14 products

❖ IT hardware production value in PRC approximately covered 81% (in Taiwan: 6.8%, in other areas: 12.2%)

❖ Advantages are global logistic operation and management capabilities

# Made by Taiwan
# Worldwide Leading Product Sectors

| | Worldwide Market Share | WW No. 1 | WW No. 2 |
|---|---|---|---|
| Motherboard | 98.4% | 🏆 | |
| WLAN Network Interface Card (NIC) | 87.0% | 🏆 | |
| Voice over Internet Protocol (VoIP) Router | 83.0% | 🏆 | |
| Notebook PC | 82.5% | 🏆 | |
| Digital Subscribe Line (DSL) Customer Premises Equipment (CPE) | 79.0% | 🏆 | |
| Cable Modem | 79.0% | 🏆 | |
| Internet Protocol (IP) Phone | 78.0% | 🏆 | |
| Personal Digital Assistance (PDA) | 73.4% | 🏆 | |
| VoIP Terminal Appliance (TA) | 71.0% | 🏆 | |
| LCD Monitor | 70.1% | 🏆 | |
| Switch | 61.0% | 🏆 | |
| WLAN Access Point (AP) | 56.0% | 🏆 | |
| Color Display Tube (CDT) Monitor | 50.7% | 🏆 | |
| Large Size LCD Panel | 46.4% | 🏆 | |
| Digital Still Camera (DSC) | 41.8% | | 🏆 |
| Optical Disc Driver (ODD) | 39.6% | | 🏆 |
| Server (System) | 34.3% | | 🏆 |

# The Taiwan IT Hardware Industry's Worldwide Market Share by Product 2004－2005

| | NB PC | DT PC | MB | Sever | CDT MTR | LCD MTR | ODD | DSC |
|---|---|---|---|---|---|---|---|---|
| 2004 | 72.4% | 29.0% | 96.5% | 32.8% | 53.6% | 67.8% | 41.6% | 31.5% |
| 2005 | 82.5% | 30.1% | 98.4% | 34.3% | 50.7% | 70.1% | 39.6% | 41.8% |
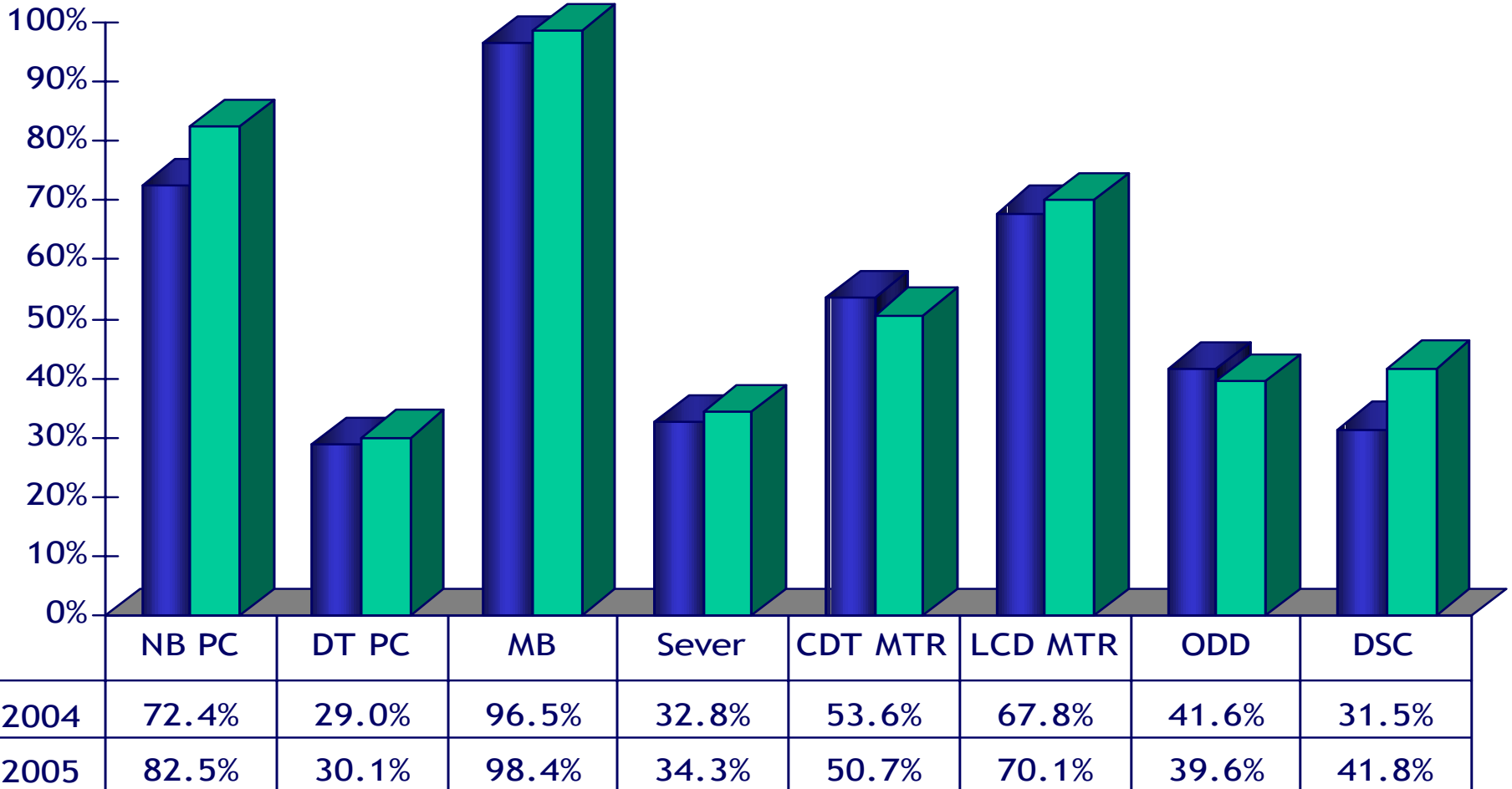
# The Taiwanese IT Hardware Industry's Shipment Destinations, 2004–2005



**2004**

Others 8.0%
Taiwan 4.2%
PRC 11.3%
Japan 7.1%
AP 11.4%
WE 28.3%
NA 29.6%
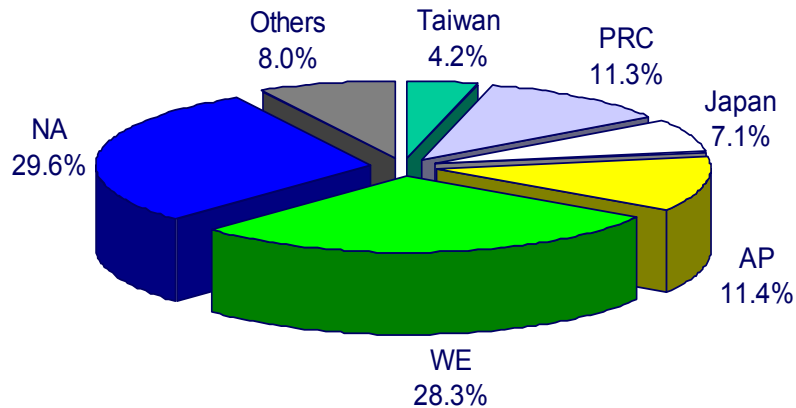
**Total: US$69,664 Million**

**2005**

NA 29.2%
Others 7.7%
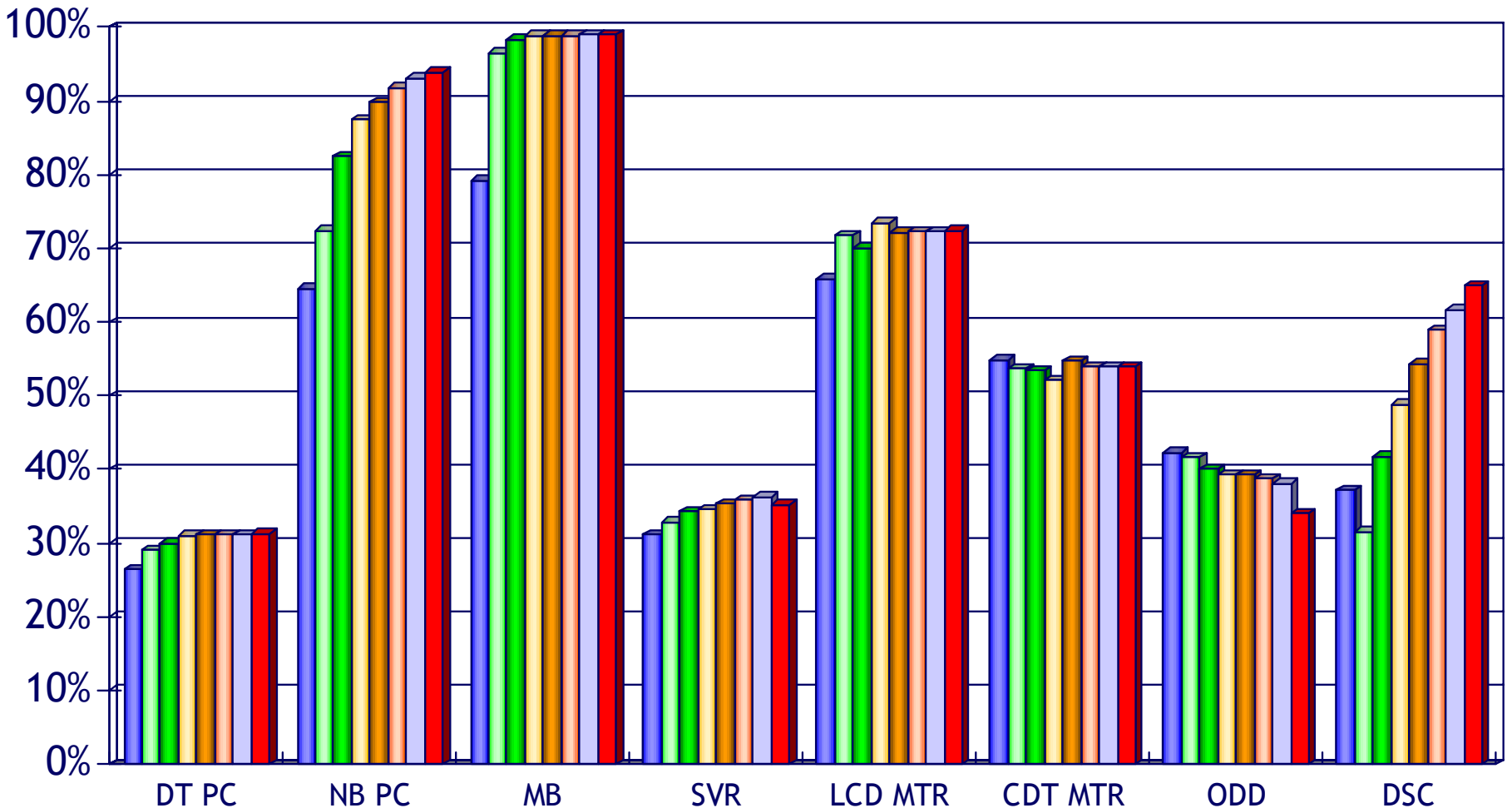Taiwan 3.2%
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WE 29.7%
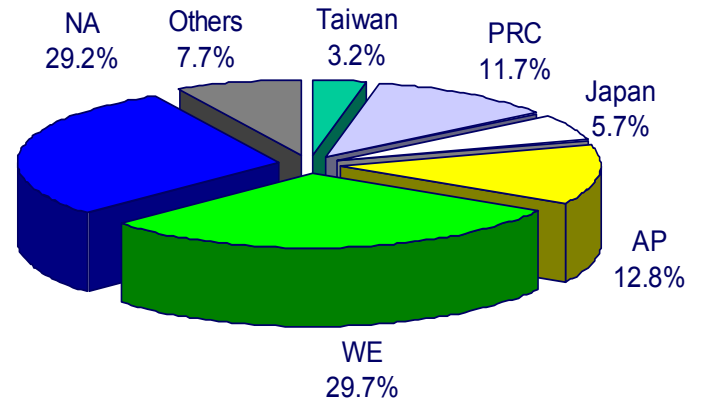
**Total: US$80,980 Million**

# The Taiwanese IT Hardware Industry's Worldwide Market Share by Product, 2003—2010

# Taiwan PC Manufacturers' OEM/ODM Partnership with Major Worldwide IT Brands

## 台灣PC廠商ODM/OEM代工關係

| | Dell | HP | Apple | Gateway | Lenovo | Acer | Fujitsu | NEC | Sony | Toshiba | Clone |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Foxconn (鴻海) | ● | ● | ● | ● | ● | ● | | | | | |
| Quanta (廣達) | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| Compal (仁寶) | ● | ● | | | ● | | ● | | | ● | |
| Wistron (緯創) | ● | ● | | | ● | | | | | | ● |
| Asus (華碩) | ● | ● | ● | | | | | | ● | | |
| Invnetec (英業達) | | ● | | | | | | | | ● | ● |
| Mitac (神通) | ● | | | | ● | | ● | ● | | | |
| Uniwill (志合) | | | | | | | ● | | | | |
| FIC (大眾) | | | | | | | | ● | | | ● |
| Arima (華宇) | | ● | | ● | | | | ● | | | ● |
| Clevo (藍天) | | | | | | | | | | | ● |
| Twinhead (倫飛) | | | | | | | | | | | ● |
| ECS (精英/大同) (Tatung) | | ● | | ● | | | | | | | ● |

資料來源: 資策會MIC, 2006年8月 ▢ TWN ▢ Japan ▢ US ▢ Others

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# 台灣PC廠商ODM/OEM代工關係(US Vendor)

| | Dell | HP | Apple | Gateway | Lenovo (IBM) |
|---|---|---|---|---|---|
| Foxconn (鴻海) | ● | ● | ● | ● | ● |
| Quanta (廣達) | ● | ● | ● | ● | ● |
| Compal (仁寶) | ● | ● | | | ● |
| Wistron (緯創) | ● | ● | | | ● |
| Asus (華碩) | ● | ● | ● | | |
| Invnetec (英業達) | | ● | | | |
| Mitac (神通) | ● | | | | ● |
| Uniwill (志合) | | | | | |
| FIC (大眾) | | | | | |
| Arima (華宇) | | ● | | ● | |
| Clevo (藍天) | | | | | |
| Twinhead (倫飛) | | | | | |
| ECS (精英/大同)(Tatung) | | ● | | ● | ● |

資料來源: 資策會MIC, 2006年8月

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